



Report to the Commissioners
Area IX Agency on Aging, Flathead County
November 18, 2019
Prepared by Lisa Sheppard, Director

On the last page are two tables, one for performance measures and one for workload indicators, showing:

FY 2018 actuals
FY 2019 annual targets
FY 2019 actuals
FY 2019 actuals as a percentage of annual targets
FY 2019 actuals as a percentage of FY 2018 actuals
FY 2020 actuals to date
FY 2020 annual targets
FY 2020 actuals as a percentage of FY 2020 annual targets

The general target is 33.33% for FY 2020, July 1, 2019-October 31, 2020, keeping in mind that some numbers will be unevenly distributed throughout the year, some will lag 30-90 days due to subcontractor billing/reporting and some will change during the end of the fiscal year reconciliation process. Additionally, all clients are counted as “new” in July, which results in total client numbers being substantially above the annual target at the beginning of each fiscal year. This effect diminishes as the year progresses. Some information is not yet available and will be reported in future months. Additional detail may be reported in the program sections below. Numbers highlighted in yellow have been revised since the last report.

Data to note:

- Although the situation is improving, we continue to have difficulty pulling accurate reports from the new DPHHS database and are recording information in our own spreadsheets as well to try to capture the data. The State is still working on multiple issues related to both data entry and reporting. Until the problems are corrected, data on the following performance measures/workload indicators may be incomplete:
 - Amount of Client Savings from Benefits Counseling
 - Number of Outreach, Information, Referral Contacts
 - Benefits Counseling Savings and Hours of Service
- **Nutrition**
 - We have increased outreach for the MOW program as we have the capacity to serve additional participants and are now outpacing the target for the year.
- **Transportation**
 - After school program ridership is down 2,575 over this time last year due to the elimination of the Kalispell City Parks and Rec rides. However, ridership is up significantly on the Kalispell Green, Red and Orange city bus lines, resulting in only a slight dip in total ridership from FY 2019.
 - Ridership on the fixed and commuter routes continue to substantially exceed the target. Paratransit ridership continues to be under target due in part to the changes in fixed route service in Kalispell that make it easier for DAR passengers to ride the fixed route. We had no

trip denials for paratransit in October, and ridership for the premium Dial-A-Ride service in Evergreen has remained steady.

▪ **Information and Referral/Assistance**

- **Outreach/Education** efforts continue to target Medicare beneficiaries, both related to Open Enrollment and BenefitsCheckUps to connect them with additional benefits.

▪ **Independent Living Services**

- The total “units of service” for all services combined continue to be substantially below target due to industry-wide paid caregiver shortages. We are working internally and with our home care provider agencies to develop other strategies.

▪ **Benefits Counseling**

- The increase in cost savings for clients coincides with Medicare Open Enrollment.
- We are slightly under target for hours of service for the year. This may be due to reporting errors in the new database. However, we have also had some open positions, which are now filled.

▪ **Ombudsman**

- The program continues to undergo major restructuring at the state level and it is unclear how it will operate in the future.

AOA Administration

Budget and Contracts

- Commissioners signed and staff submitted the FY 2020 DPHHS contract and updated reports through September 2019.
- We are waiting to hear if we have been awarded a new BEC grant from the National Council on Aging (NCOA), which we submitted in October in partnership with the Area VI Agency on Aging. If awarded, the grant will cover 9 months beginning January 1, 2020 for a total of \$26,250.

Building

- Nothing to report.

HR/Staff Development

- Nothing to report.

State/Federal/Legislative Issues

- Montana Area Agencies on Aging Association (M4A) - M4A advocates for aging services funding and policies that support older Montanans.
 - Lisa did not attend the quarterly M4A meeting in Helena, October 28-30, but did talk at length with the new M4A director by phone regarding how AOA provides services and issues/needs of older adults in Flathead County.
 - Lisa participates on two subcommittees that assist the DPHHS State Unit on Aging with contract administration and program improvement: Budget/Funding and Legal Services.
 - M4A is providing input and information to the Children and Families Interim Committee in support of its study of Senior and Long-Term Care.
- National Association of Area Agencies on Aging (n4a) – n4a advocates for funding and policies that support older Americans and enable the aging services network to meet their needs; it provides training and technical assistance to members

- Legislatively n4a is focused on reauthorization of the Older Americans Act which expired at the end of September.
- The House unanimously approved a bipartisan bill to reauthorize the Act on October 28, 2019. It is waiting to be taken up by the Senate.

AOA Advisory Council

- The Council met on November 7, 2019 and discussed options and strategies for new member recruitment and increasing member engagement.

Outreach/Education/Media/Events

Note: Transportation related outreach is noted in the Eagle Transit section below.

10/2/2019: outreach at Whitefish Community Center re. increasing participation in social dining, 10

10/7/2019: KGEZ monthly interview, 15,000

10/22/2019: Medicare 101 class, 21

10/23/2019: participated in NW MT Care Transitions Coalition meeting, 30

10/24/2019: hosted Senior Info Fair at Gateway Community Center along with presentation on “What’s New in 2020?”, 40

10/29/2019: participated in Summit of Coalitions meeting, 20

October multi-media promotions:

- Medicare 101
- Senior Info Fair

Eagle Transit

- Montana Department of Transportation (MDT):
 - Annual Transportation Coordination Plan/5311 Application/Capital Request
 - We have scheduled two public input meetings
 - This afternoon from 3:30-5:30 in the South Campus conference room
 - December 5th from 4:30-6:30 at the City Council Chambers in Whitefish
 - We will also conduct a business owner survey in November/December
 - Quarterly/annual reporting
 - We submitted the FY 2020 1st quarter report this week.
 - We completed initial entries for FY 2019 into the National Transit Database (NTD) in mid-October. Montana Department of Transportation reviewed and signed off on our entries. NTD requested clarification for some of our entries, which we provided last week. MDT is in the process of reviewing them.
 - 5-Year Transportation Development Planning Grant
 - Discussions continue with Glacier National Park regarding our Cooperative Agreement (CA). We have provided GNP with our conditions for continuing with the CA. Lisa, Tom and Commissioner Brodehl are scheduled to meet with GNP Superintendent Jeff Mow and regional and federal National Park Service staff tomorrow.
 - We continue to meet with community leaders and others to gauge interest in and support for an integrated transit system serving Glacier National Park and the surrounding gateway communities. Since the last report:
 - On 10/3/2019, Tom met with WGM Group, an engineering firm looking at Glacier Park infrastructure options

- On 10/23/2019, Tom met with SNOW Bus staff to talk about options for coordinating with The Mountain Climber during the winter and shoulder seasons
 - On 10/23/2019, Tom met with Kalispell City Council candidate to talk about The Mountain Climber and general transit needs/issues
 - On 10/30/2019, Tom presented on The Mountain Climber to the Kalispell Job Service
- Outreach/Education/Media/Special Events:
 - As required by federal regulations, a monthly ad ran in the Daily Inter Lake in August and September.
 - Daily radio ads ran on KGEZ
 - See above for outreach related to the integrated transit system proposal since last month's report.
 - Note: numbers on Performance Measures table include two items described in last month's report as they occurred in October
- Operations:
 - Nothing to report.
- Staff Development/Training:
 - Nothing to report.
- Transportation Advisory Committee (TAC)
 - At the request of Chuck Wilhoit, TAC Chair, Lisa submitted online the TAC's letter in support of The Mountain Climber as public comment on the GTSR Corridor Management Plan Environmental Assessment Report.
- Glacier National Park
 - See above for updates regarding the integrated transit system proposal.

Nutrition

- We distribute nutritional education materials monthly to all home-delivered clients and all senior centers.
- Our annual Thanksgiving Meal will be Friday November 22nd.

I & R/Assistance/Ombudsman/Independent Living Services

- I&A/Benefits Counseling/BEC:
 - Medicare Open Enrollment runs October 15th through December 7th.
 - DPHHS is sponsoring a new PSA that is running September 23rd through the middle of December.
- Veteran Directed HCBS Program:
 - We fully transitioned the program from Area VI on October 1st with 26 enrolled veterans. We now have 33.
- Independent Living Services:
 - Given the paid caregiver shortage, we continue to explore other options meet client needs.

Senior Centers - A primary AOA focus is outreach to area Senior Centers to build relationships, extend support, and explore new opportunities for partnership.

- Lakeside Chapel plans to resume MOW and social dining services in January.
- Eagle Transit Manager Tom Schneider and AOA Assistant Director Beth Richardson met with the Bigfork Community Center Board to talk about ways AOA/Eagle could support the Center to provide transportation to older adults in Bigfork.

November 2019 Report: Performance Measures Tables - October 2019 stats (FY 2020)

33.33%

MEASURE	FY 2018 Actuals	FY 2019 Target	FY 2019 Actuals	FY 2019 % of Target	FY 2019 as % FY 2018	October	Total Last Report	Total/Avg. to Date	FY 2020 Target	% Target
# Receiving Independent Living Services	110	98	98	100%	89%	3	51	54	119	45%
# Receiving Meals on Wheels	374	465	401	86%	107%	34	265	299	465	64%
# Seniors Receiving Congregate Meals	1,404	1,200	1,538	128%	110%	123	816	939	1,200	78%
# Eagle Transit DAR Unduplicated Riders	331	450	333	74%	101%	20	188	208	450	46%
Client Savings from Benefits Counseling	N/A	N/A	N/A	N/A	N/A	\$34,161	\$57,889	\$92,050	\$400,000	23%
% of IL Service Recipients at Moderate to High Risk of Institutionalization	92%	88%	93%	106%	101%	88%	89%	88%	88%	100%
Per Meal Cost of Nutrition Services	\$6.29	\$7.00	\$6.80	97%	108%	6	\$5.78	\$5.80	\$7.00	83%
% Overall Satisfaction with Nutrition Services from Annual Survey	97%	95%	97%	102%	100%	N/A		0%	97%	0%
% Overall Satisfaction with Independent Living Services from Annual Survey	90%	95%	97%	102%	108%	N/A		0%	90%	0%
Maximum annual number of transportation complaints	12	36	4	11%	33%	1	10	11	25	44%
WORKLOAD INDICATOR	FY 2018 Actuals	FY 2019 Target	FY 2019 Actuals	FY 2019 % of Target	FY 2019 as % FY 2018		Total Last Report	Total/Avg. to Date	FY 2020 Target	% Target
Nutrition						October				
Total Meals	80,639	80,000	78,515	98%	97%	7,728	21,023	28,751	80,000	36%
MOW	47,409		46,658	N/A	N/A	4,783	12,451	17,234		
Social Dining (Congregate)	33,230		31,857	N/A	N/A	2,945	8,572	11,517		
Nutritional Assessments Conducted	1,846	2,000	1,858	93%	101%	170	654	824	2,000	41%
Transportation						October				
Total Ride Count	99,104	90,000	116,017	129%	117%	8,608	32,733	41,341	100,000	41%
Paratransit/Dial-A-Ride Count	31,645	30,000	26,784	89%	85%	1,742	6,124	7,866	30,000	26%
City, Commuter and Other Ride Count	67,459	60,000	89,233	149%	132%	6,866	26,609	33,475	70,000	48%
Eagle Transit Outreach/Special Events	42	15	31	207%	74%	8	16	24	25	96%
Information and Referral/Assistance						October				
Outreach, Information, Referral Contacts	19,429	18,000	26,014	145%	134%	2,150	4,959	7,109	18,000	39%
Outreach/Education/Media Efforts	116	120	129	108%	111%	8	28	36	120	30%
Independent Living			66%			October				16%
Homemaker Units of Service	2,005	1,324	1,433	108%	71%	166	386	552	2,000	28%
Escorted Transportation Units of Service	2,314	1,391	886	64%	38%	79	217	296	2,174	14%
Respite Units of Service	2,079	3,250	1,793	55%	86%	75	289	364	2,857	13%
Community Support/Senior Companion Units of Service	1,310	1,176	508	43%	39%	55	96	151	1,471	10%
Personal Care Units of Service	231	65	146	225%	63%	11	31	42	174	24%
Benefits Counseling						October				
Benefits Counseling Hours of Service	502	450	1,193	265%	238%	81	55	136	500	27%
Ombudsman						October				
Ombudsman consults/cases opened	1,250	1,100	1,116	101%	89%	98	204	302	1,000	30%